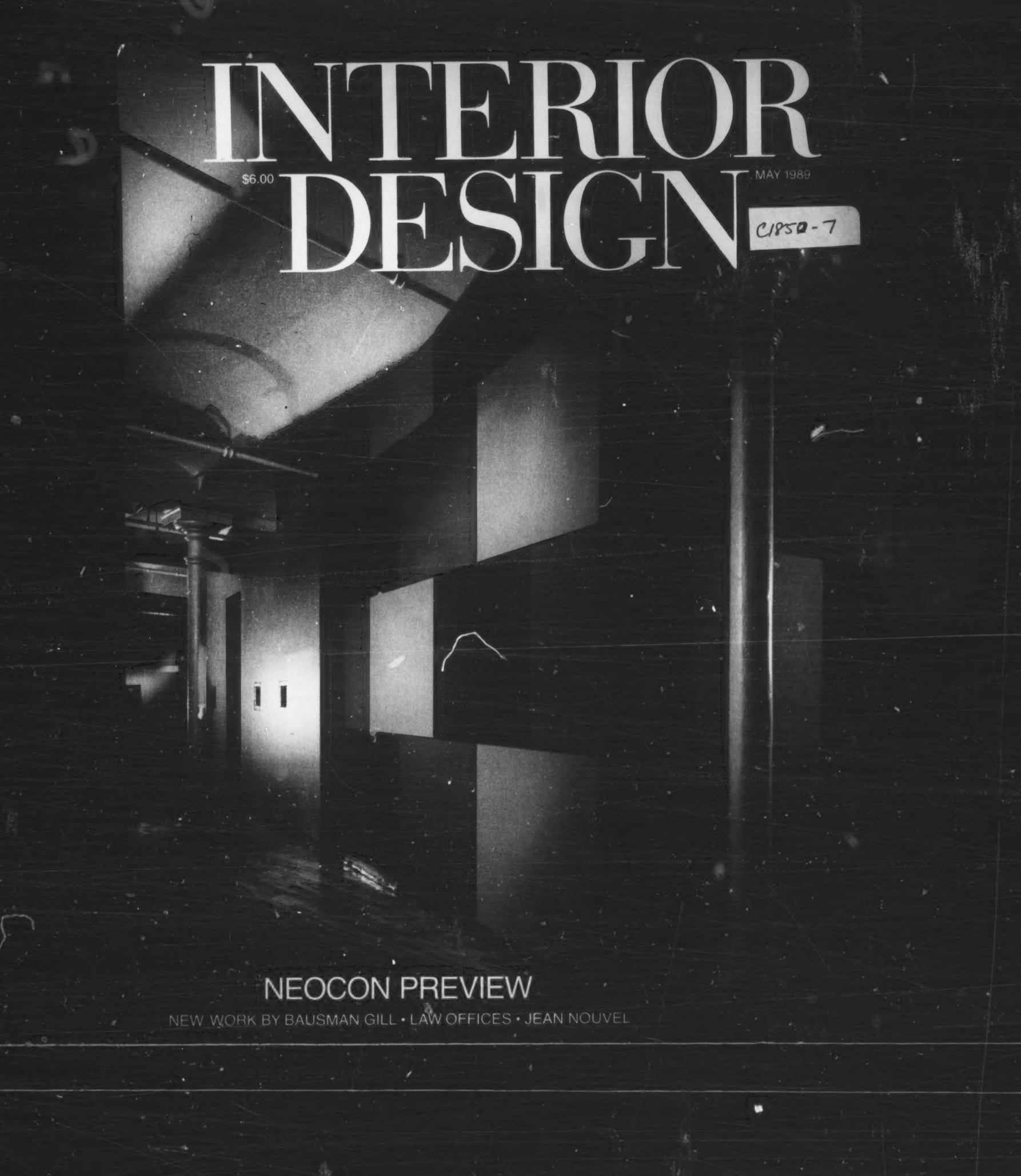

INTERIOR DESIGN

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NEOCON PREVIEW

NEW WORK BY BAUSMAN GILL • LAW OFFICES • JEAN NOUVEL

DIFFA Announces Year-End Grants

The board of trustees of DIFFA (the Design Industries Foundation for AIDS) has announced the awarding of a number of year-end grants to AIDS-related groups nationwide. The 20 recipients of these grants, which total $376,900, include organizations that provide direct care services, education and prevention information, community-based research, housing and legal advocacy to people affected by AIDS.

Grant recipients are the Bering Foundation in Houston ($20,400); PWA Coalition of Dallas ($21,500); Community Research Initiative ($50,000); Lambda Legal Defense and Education Fund ($15,000); U.S. Conference of Mayors ($35,000); National Association of People With AIDS ($40,000); PWA Coalition/New York ($25,000); AIDS Resource Center ($15,000); Stop AIDS Project/San Francisco ($15,000); Project Open Hand ($15,000); Living With AIDS Fund ($25,000); Fund for Human Dignity ($20,000); Project Inform ($20,000); God's Love We Deliver ($25,000); and also God's Love We Deliver, Montefiore Hospital, Village Nursing Home, St. Peter's AIDS Momentum Outreach, Northern Lights, Body Positive and Manhattan Plaza AIDS Project (holiday gifts of $5,000 each).

For more information about DIFFA and its grant awards, contact Russell Radley at the organization, 212/727-3100. □

DEBUT

Steelcase completing new center in Grand Rapids suburb

Steelcase, the furniture manufacturing giant, is about to have a pyramid of its own. The company is in the final stages of completing its corporate development center, billed as the industry's "most comprehensive research and development center." The 575,000-sq.-ft. building, housing 10 testing laboratories and 750 employees, opens in suburban Grand Rapids later this month.

According to Steelcase chairman Robert C. Pew, the $111 million center was designed to enhance the product development process and "spark the company's expected growth." The seven-story, pyramid-shaped building, designed by The WBDC Group of Grand Rapids, "will encourage both the planned and spontaneous interaction of people and ideas to enhance the product development process. Research has to be nurtured in a creative environment." Three organizational/environmental psychologists specializing in architectural design participated in the center's design process. These included professors at Cornell University and MIT. Other consultants included an acoustics professor at Penn State University and a "human factors" professor at the University of Wisconsin.

JERRY COOPER

AT NEOCON

Interior Design *sponsors opening event*

Interior Design magazine is a co-sponsor of NEOCON's opening event, a symposium entitled "World Culture: Agenda for the 1990s." Scheduled for Tuesday, June 13th, at 8:30 a.m. in the auditorium of the recently restored Chicago Theatre (featured in our March issue), the program offers a gathering of world cultural leaders discussing "their countries' cultural directions for the 1990s."

Charles Kuralt of CBS News will chair the panel, whose members will include Emile Biasini, a deputy minister attached to the Minister of Culture, of Communication, of Major Works and of the Bi-centennial, and also in charge of Major Works for the government of France in Paris; Viacheslav Leonidovich Glazychew, a journalist and vice president of the Union of Architects, USSR, in Moscow; and Adele Chatfield-Taylor, president of the American Academy in Rome, based in the New York office.

And, of course, we're also co-sponsoring, with the IBD, the annual Midnight Affair reception. The black-tie event, at Chicago's historic Navy Pier, begins at 9 p.m. Tuesday evening. For Midnight Affair ticket information, contact the IBD's national office at 312/467-1950. □

BRIEFLY

HEADLINES

New Mexico *has become the seventh U.S. jurisdiction to approve designer licensing. House Bill 353, restricting the use of the title "interior designer" to individuals who have met specific requirements of education, examination and professional experience, was signed into law by Gov. Garrey Carruthers on March 15th.*

BUSINESS

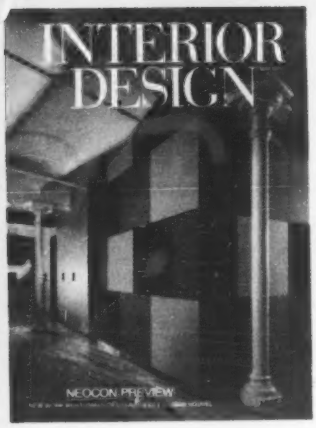
Knoll International *has announced its acquisition of Spinneybeck, the well-known North American leather resource. Knoll is purchasing the U.S. and Canadian operations of Spinneybeck and maintaining the company as a separate division headed by Philip Manchee, Spinneybeck president. Manchee will work with Arthur Sager, Knoll's senior vice president and managing director of textiles and leather. "Knoll International will benefit immeasurably from the addition of Spinneybeck's high-quality leathers to complement the Knoll textile line," said Knoll chairman Marshall S. Cogan. In a related move, Knoll has named Hazel Siegel, long-time director of design for DesignTex Fabrics, to the post of managing director of design, worldwide, for Knoll Textiles.*

ORGANIZATIONS

Joy Dohr, Authur Hawn and Ron Veitch *have been named Fellows of the Interior Design Educators Council (IDEC). The induction took place at the organization's recent annual conference at Miami University in Cincinnati. The three were named "in recognition of their outstanding contributions to the profession." Patrick Flanagan received the Merit Award and Emeritus status was granted to Mildred Lamm, Mary Jo Weale and Jean Klopfer. Newly elected IDEC officers are Shirley Singer, Louisiana State University, president; Paul Eshelman, Cornell University, vice president; Bob Parsons, Virginia Tech Institute, corresponding secretary; and Virginia Weinhold, Ohio State University, treasurer.*

The ASID *board of directors, during March meetings in Houston, adopted a statement regarding interior design philosophy. The position, recommended by the ASID Position Paper Committee, is intended to "provide an intellectual foundation for the interior design profession" and aims to promote greater public understanding of the role and responsibility of interior*

Continued

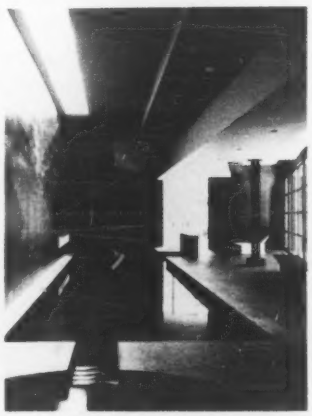


News

WINNERS

AIA announces 1989 Honor Award winners

The American Institute of Architects (AIA) has designated 12 buildings for its 1989 Honor Awards. The winners were: Martha's Vineyard Residence, Massachusetts, by Steven Holl Architects of New York (shown here, left); Reid House, Johns Island, South Carolina, by Clark & Menefee Architects, Charleston; Central Housing Office Building at the University of California, Irvine, by Eric Owen Moss, Architect, Culver City, California; Seneca Lake Pier and Pavilion, Watkins Glen, New York, by Chad Floyd, AIA, of the Centerbrook firm in Essex, Connecticut; Desert View Elementary School in Sunland Park, New Mexico, by Perkins & Will of Chicago; Kings Point Pool Addition, Long Island, New York, by Tod Williams Billie Tsien & Associates, New York (shown here, right); Delaware Aqueduct restoration, connecting New York and Pennsylvania, by Beyer Blinder Belle, New York; Miller Park Plaza in Chattanooga, Tennessee, by Derthick, Henley & Wilkerson/ Koetter, Kim & Associates, Boston; Folger Shakespeare Library in Washington, DC by Hartman-Cox Architects, Washington; Headquarters Library of the Clayton County Library System, Jonesboro, Georgia, by Scogin Elam and Bray Architects of Atlanta; Hansen House in Wilmette, Illinois, by Hammond Beeby and Babka of Chicago; and the Meyer May House Museum in Grand Rapids, by Tilton + Lewis Associates, Chicago (featured in our November, 1987, issue. □



BRIEFLY *Continued*

designers in society. The statement is as follows: "Interior design is dedicated to advancing the quality of life through meaningful inhabitation."

CONFERENCES

Andrea Loukin, Interior Design's *Market editor, will be among panelists at the 30th annual International Furnishings and Design Association (IFDA) Conference, scheduled for May 18th through 21st at Loews Anatole Hotel in Dallas. This year's conference theme is "International Forum: Design Passport." For further information, contact IFDA, 107 World Trade Center, P.O. Box 58045, Dallas, TX 75258, (214) 747-2406.*

The 39th annual *International Design Conference in Aspen, titled "The Italian Manifesto: The Culture of Nine Hundred and Ninety Nine Cities," will be held from June 13th to 18th and will explore "the origins and dynamics of Italian design" during six days of exhibits, workshops, discussions, demonstrations and performances. For information on registration, write or call IDCA, P.O. Box 664, Aspen, CO 81612, (303) 925-2257.*

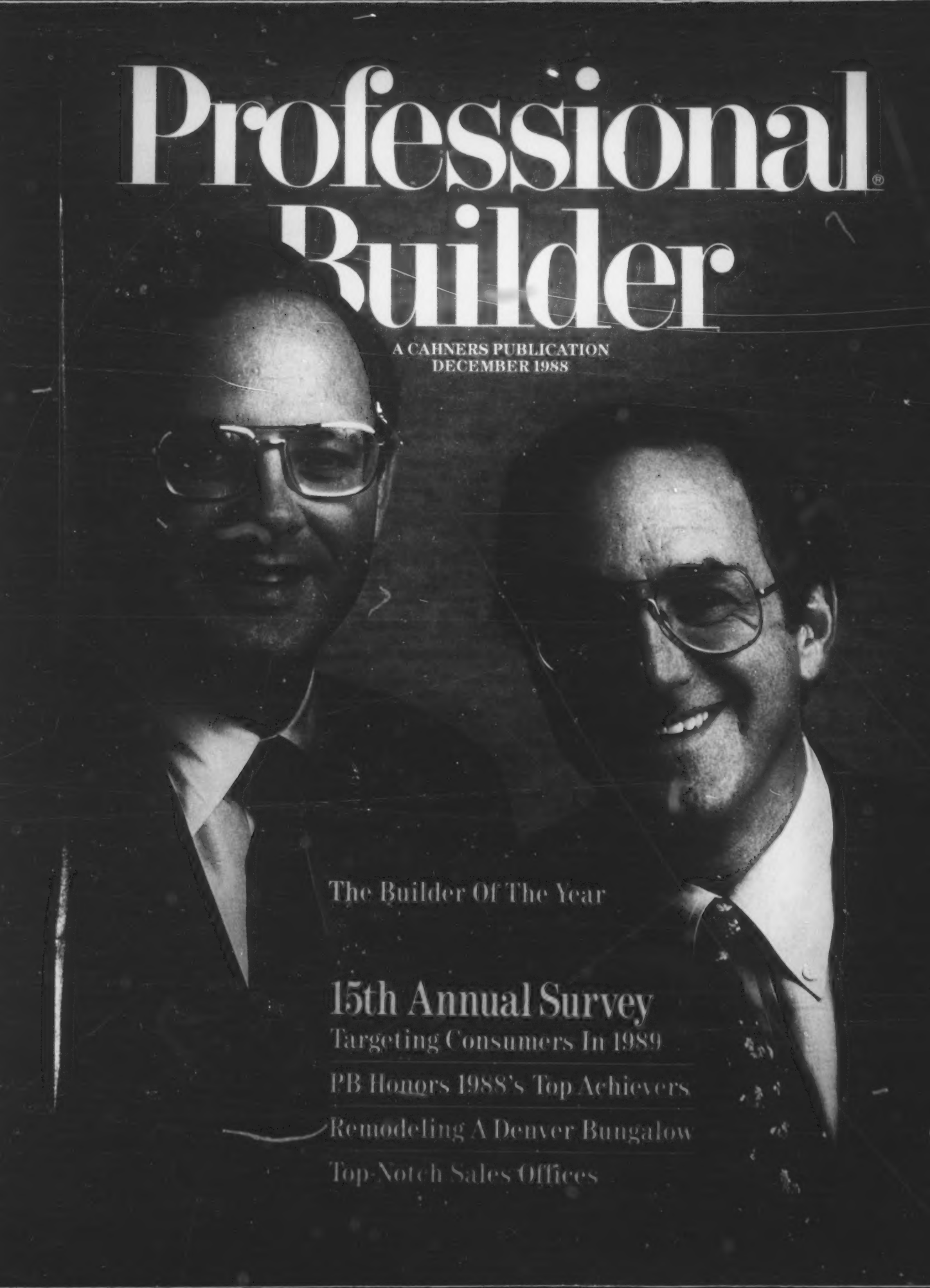
"Assessing Wright's Legacy, *The Reality and Myth of Frank Lloyd Wright" is the title for the fourth annual Domino's Pizza Frank Lloyd Wright Symposium, to be held in Ann Arbor, Michigan, July 26th through 30th. The conference will be hosted by the National Center for the Study of Frank Lloyd Wright at Domino's Farms in conjunction with the College of Architecture and Urban Planning at the University of Michigan. For more information, contact the University of Michigan's Extension Service, Conferences and Institutes, 200 Hill Street, Ann Arbor, MI 48104-3297, (313) 764-5305.*

We sincerely regret that, because information went astray, there were some omissions from the Top 100 Interior Design Giants of 1989, published in our January issue. Two of last year's Giants, Jung/Brannen Associates, Inc. and Staffelbach Designs & Associates, Inc., both firms specializing in office design, were not included in our final ranking. The following bar shows how these firms should have been ranked for 1989. All information that appears in the usual listings is given, with the exception of information about staff. □

RANK Jan. '89 (Jan. '88)	FIRM NAME HEADQUARTERS & BRANCH OFFICES	INTERIOR DESIGN FEE IN MILLIONS	TOTAL FIRM FEES IN MILLIONS	DOLLAR VOLUME IN MILLIONS	TOTAL SQ. FT. IN MILLIONS	1988 INSTALLATIONS	1989 INSTALLATIONS
26 (29)	**Jung/Brannen Associates, Inc.** **Boston** New York; Hartford, CT; Istanbul, Turkey	7.12	15.3	120.6	3.45	Massachusetts Financial Services, Boston Marsh & McLennan, Inc., Boston Aetna Life & Casualty Pkg., Hartford, CT Massachusetts Gen'l Hosp. Lab, Charlestown, MA DiCara, Selig, Sawyer & Holt, Boston	Citicorp, NYSU, Queens, NY Thomas H. Lee Company, Boston Aetna Life & Casualty Bid Packs, Hartford, CT Aetna Life & Casualty, Boston Springfield Institute for Savings, Springfield, MA
46 (53)	**Staffelbach Designs & Associates, Inc.** **Dallas** Kansas City, MO	4.04	4.49	40.5	1.35	Mobil Oil Corporation, Dallas Fulbright & Jaworski law offices, Dallas The Thompson Companies, Dallas Gifford Hill, Inc., Dallas Prentiss Properties Inc., HQ, Dallas	Borell Jacobs, Dallas Vornado, Inc., Paramus, NJ Yellow Freight Systems, Inc., Kansas City, MO AT&T, Kansas City, MO IBM, Fort Worth, TX

Professional Builder®

A CAHNERS PUBLICATION
DECEMBER 1988



The Builder Of The Year

15th Annual Survey
Targeting Consumers In 1989

PB Honors 1988's Top Achievers

Remodeling A Denver Bungalow

Top-Notch Sales Offices

Professional Builder

DECEMBER • 1988 VOL. 53

THE MAGAZINE OF HOUSING AND LIGHT CONSTRUCTION/A CAHNERS PUBLICATION

The Toll brothers are the Builder Of The Year. They continued their East Coast expansion while racking up record revenues and profits. Page 114.

These past 12 months were a year of accomplishments. *Professional Builder*'s Achievement Awards honor 10 individuals for a job done well. Page 122.

Our 15th annual Consumer Survey describes what shoppers are looking for in their next home. Complete results, beginning on page 132.

FEATURES

The Builder Of The Year 114

Robert and Bruce Toll directed their East Coast building company to record revenues and profits in 1988. Quite a feat, considering that Toll Brothers Inc. opened 15 new communities. That usually means high start-up costs.

The brothers Toll keep track of every last nickel they spend to build a house. When it comes time for review, a sophisticated management information system produces the reports the brothers need for evaluation.

Toll Brothers Inc. is a case study in how to manage for growth and profitability.

Achievement Awards 122

Professional Builder honors 10 individuals who made a difference in 1988. These men are honored for: pushing housing onto the national political agenda, sheltering low-income families, fighting growth controls, improving housing design, showing leadership, creating sophisticated marketing campaigns, building quality housing and bringing professionalism to the remodeling industry.

Smarter Housing For The Money 150

L.J. Hooker Homes of Orlando, Fla., has a formula for selling affordable housing. If the house evokes certain reactions from shoppers, the builder considers it a success. Hooker Homes sold more than 80 houses priced from less than $100,000.

Remodeling Project Of The Month 153

A room addition brought light and space to a two-story house on Boston's north shore. Builder/remodeler Larry Tobine added 455 square feet to the 1350-square-foot house.

On The Cover

Marc Berlow photographed the Toll brothers, the Builder Of The Year, at their headquarters near Philadelphia.

Professional Builder

THE MAGAZINE OF HOUSING AND LIGHT CONSTRUCTION/A CAHNERS PUBLICATION

High technology takes over the sales center. Page 41.

Ohio builder Phil Fankhauser is testing his idea for designing, building and franchising multifamily housing for retirees. Page 24. **Readers of this magazine** accounted for 92 percent of all housing starts in 1987, a survey finds. Page 38. **Who started the most** housing in 1988? asks a PB survey. Page 38. **Apartment design in Denver** looks like for-sale housing. And that helped the lease-up. Page 52. **State-of-the-art** comforts are seen in Florida's New Southern Home. Page 68. **Researchers** at GE Plastics are devising new applications for its materials. A prototype house is under construction. Page 89.

Front doors, interior doors and garage doors. Page 158.

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Matter Of Opinion 247
It's time to face up to the need for affordable housing.

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REPRINTS of articles are available in quantities of 500 or more. For a specific quotation, contact Katie Pyziak, Manager, Marketing Services, 1350 E. Touhy Ave., Des Plaines, IL 60017-5080; phone, 312/635-8800.

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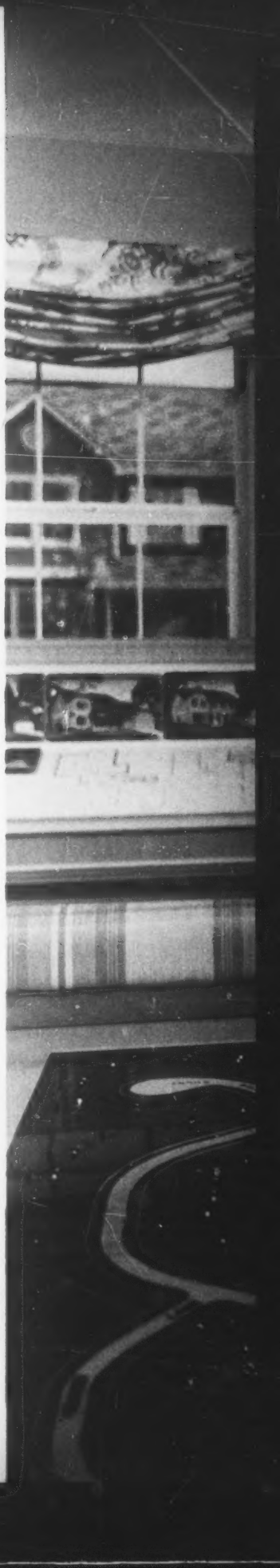
Professional Builder's
15th Annual Consumer Survey

WHAT 1989 BUYERS WANT IN HOUSING



Turning home shoppers into satisfied homeowners is an exact science and a fine art. It takes market research, careful technique and the knack to put it all together. Why has home building become so sophisticated? Because builders construct more than shelter, they build dreams. A home today does not just reflect a lifestyle, it is a lifestyle.

To equip builders with the most up-to-date market information available, *Professional Builder* has updated and conducted a consumer survey on an annual basis, now in its 15th year. A nationally representative sample of households was surveyed by National Family Opinion Inc., an independent research firm. The survey is based on 1072 replies. Builders also were questioned about their construction and marketing practices by the Bureau of Building Marketing Research, encompassing 319 replies.

Surveys include break-outs by region, home price, family size, household composition, buyer age, income and market segments.

Complete copies of both consumer and builder surveys are available for $320 each. Both surveys are available for $450 if purchased together. Send check or money order to *Professional Builder*, P. O. Box 5080, Des Plaines, Ill., 60017-5080.

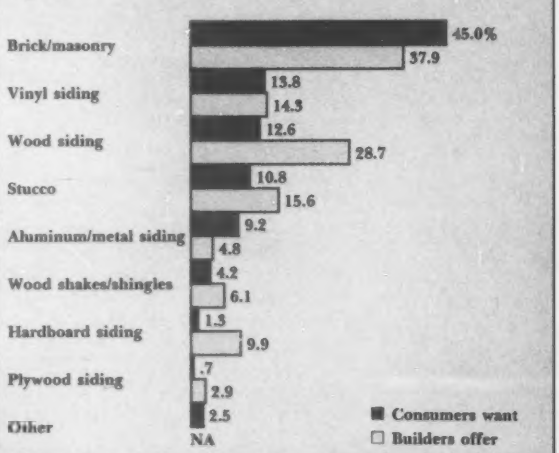
Written by Contributing Editor Karen Wells

GIVE THEM A ONE-STORY HOUSE WITH A TWO-CAR GARAGE

It is design that brings buyers into models; it is design that sells them. Survey results show consumer wants. The right combination adds it all up on the bottom line.

Brick Ranks As Favorite Exterior Finish

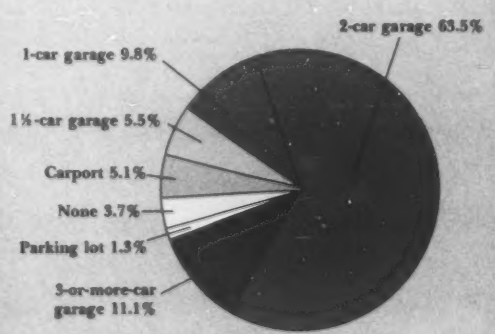
Overall, brick/masonry is preferred by consumers and appears on 37.9% of builders' best-selling models. Regionally, brick is favored by consumers in all geographic areas except the East and West Coasts. In the East, wood siding and wood shakes and shingles are preferred and in the Pacific region, stucco is the top exterior finish.



2-Car Garage Gives Buyers The Space They Need

Almost 64% of consumers prefer a 2-car garage in new homes; 63.4% of best-selling models include 2-car garages. Leading up to that garage, 58.1% of consumers prefer a concrete driveway and 25.8% want asphalt. Builders include 55.5% concrete and 31.6% asphalt driveways.

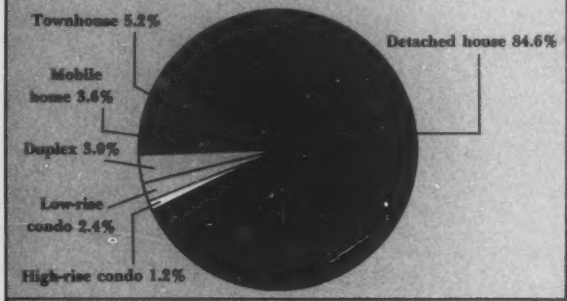
Garage facilities consumers prefer



Detached Homes Are Still The Runaway Favorite

Among all consumers surveyed, a detached house on its own lot is still preferred. Buyers of attached homes want a townhouse with 3 or more units per building.

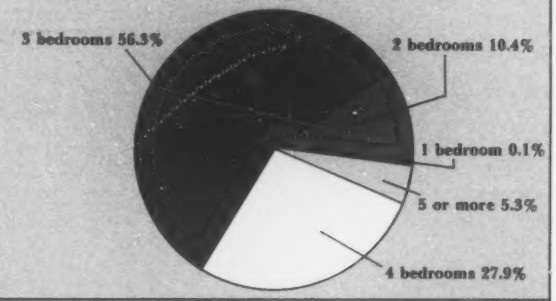
Home type consumers prefer



Buyers Of Detached Housing Want 3 Bedrooms

Three-bedroom homes are favored by all buyer types and in most geographic regions. Among builders' best-selling models, 47.3% have 3 bedrooms.

Number of bedrooms detached buyers prefer



Single Level Is Preferred Overall; 2-Story For Buyers Of Attached

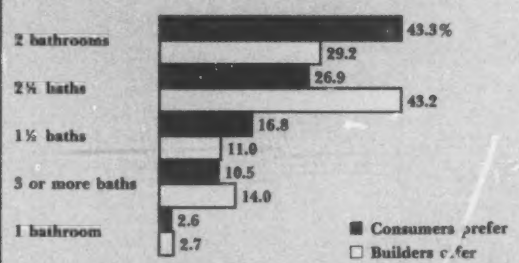
The largest percentage of detached buyers want a single-level home. They are preferred by all buyer types except move-up buyers who like 2-story homes. Almost 50% of attached buyers want units with 2-stories or more; 50% of best-selling models are 2-story homes.

Number of levels in new home	Preference detached buyers	Preference attached buyers	Builders' best-selling models
Single level	44.4%	26.3%	32.1%
2-story or more	28.1	48.8	50.3
Split-level	18.7	22.5	6.2
1½ story	8.9	2.5	11.4

2 Bathrooms Are Favored Among Buyers

Among all consumers, 43.3% want 2 bathrooms in the new homes they buy. Almost the same percentage of best-selling models have 2½ baths. More than 50% of buyers of homes less than $99,000 want 2 bathrooms; 3 bathrooms are preferred as the home price range increases.

Number of bathrooms



Traditional Styling Continues As Top Preference

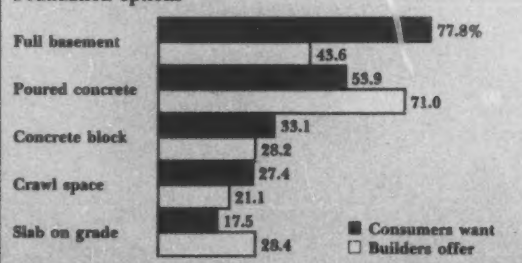
Traditional architectural styling is preferred by all buyer types. For homes priced less than $85,000, 42.9% of consumers preferred traditional; 30% of consumers in New England preferred colonial styling.

Architectural style	Consumers prefer	Builders' best-selling models
Traditional	35.5%	[illegible]
Contemporary	28.7	[illegible]
Colonial	16.1	[illegible]
Spanish	4.6	1.7
Victorian	4.5	3.7
Tudor	3.9	2.5
Other	6.7	4.1

Full Basement Satisfies Most Buyers

More than 75% of consumers prefer a full basement in the new homes they buy. About 50% of buyers want a poured concrete foundation.

Foundation options



Note: Consumers rated these options on a scale of 1 to 5, from least desirable to most desirable. Shown is a composite of ratings 4 and 5, those consumers who rated these options as more desirable on the scale.

Their Shopping Lists Include Fireplaces, Multipurpose Rooms And A Short Commute

Size of House Varies By Home Price Range

The median size of a new home preferred by consumers is 1808 square feet. The median size of builders' best-selling models is 2396 square feet. Best-selling detached models range in size from a median of 2323 square feet for a house priced between $65,000 and $85,000 to 4126 square feet for houses priced in excess of $500,000.

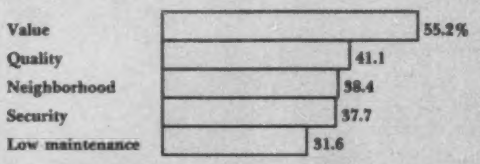
Median size of new home sought by consumers

Home price range	Consumers prefer
Less than $85,000	1448 sq.ft.
$85,000 to $99,000	1775
$100,000 to $149,000	2095
$150,000 to $199,000	2103
$200,000 to $300,000	2400
More than $300,000	3052

Perceived Value Plays A Key Role In The Buying Decision

Among 5 different house attributes, more than 50% of all consumers rated value as more important, expressing its significance in the buying decision.

House attribute



Note: Consumers rated these attributes on a scale of 1 to 5, from least desirable to most desirable. Shown is a composite of ratings 4 and 5, those consumers who rated these attributes as more important on the scale.

When It Comes To Credibility, Consumers Won't Take Builder's Word For It

In determining the credibility of claimed construction quality and energy-saving features, consumers depend on their own inspection as well as guarantees and warranties. They also seek out builders' former customers for advice. Most builders offer guarantees and supply information through salesmen and literature.

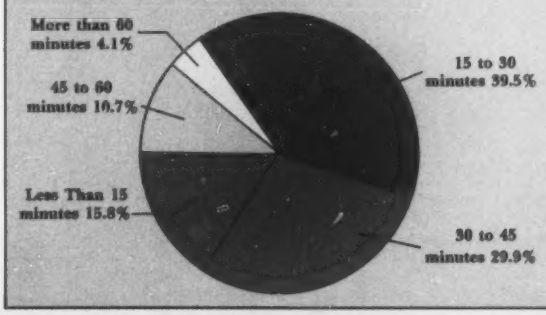
How consumers determine builder credibility	Quality	Energy
By visual inspection	79.0%	60.4%
Ask for guarantees/warranties	63.8	66.2
Ask others who bought from builder	59.2	39.9
By comparison with other homes	57.2	38.0
Get independent evaluation	49.1	37.8
Ask for literature	31.5	49.1
Look for brand names	29.3	43.3
Take builder's word for it	15.5	14.3
Not concerned about it	2.1	3.8

How builders market features	Quality	Energy
Written guarantees/warranties	64.4%	38.0%
Part of salesmen's presentation	64.4	58.4
Literature or brochures	57.7	54.2
Supplier promotion material/literature	39.2	47.6
Sales-center displays	29.7	23.5
Independent evaluation/testimonial	27.0	21.1
Signage or model-home stickers	27.0	23.5
Cut-away exhibits	10.8	12.1

Half Of Buyers Want Less Than A 1/2-Hour Commute

An important consideration in the preferred location of a new home is the commute to work. Almost 40% of consumers prefer a 15-to-30 minute commute.

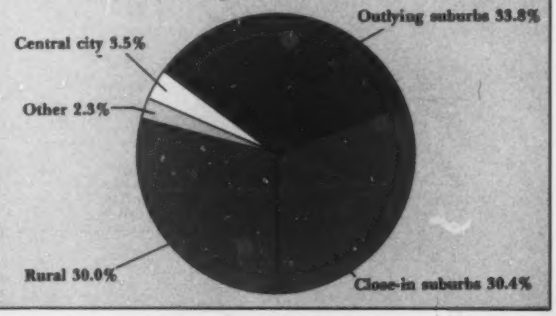
Maximum commute consumers want



Suburban And Rural Living Are Most Desired

Preferred location is divided between outlying suburbs, close-in suburbs and rural areas. The greater the home price, the less buyers cared for a rural environment.

Environment consumers prefer



New Models Designate More Space For Owner's Comfort

Builders reported how room size has changed over the past few years. Emphasis is on enlarging the master bath and the master suite. Formal living spaces are losing the space race.

How the size of builders' best-selling model has changed	Increasing	Decreasing	Staying the same
Master bath	71.3%	2.6%	26.2%
Master suite	64.4	4.8	30.9
Kitchen	54.6	8.2	37.2
Total house	41.3	16.5	42.2
Family room	36.4	13.4	50.2
Dining room	17.6	26.4	56.0
Formal living room	14.4	42.6	43.1

Detached Homes Show Off The Acreage; Attached Units Offer Yards

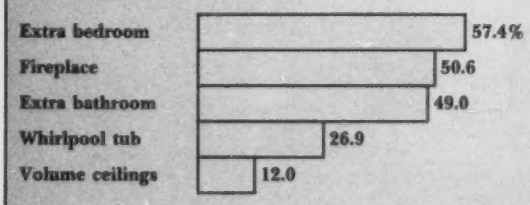
More than 50% of best-selling detached homes have a ½-acre or larger lot. Attached homes offer private courts and common open space. Lots for detached models average 19,426 square feet with a front elevation averaging 45.3 feet wide.

Size of lot included with best-selling home	Detached homes	Attached homes
1/2 acre or more	55.1%	7.7%
Narrow frontage/deep rear yard	34.2	6.2
Minimum yard with private court	11.4	46.2
No private yard/ common open space	4.4	43.1
Narrow frontage/ deep front yard	5.7	1.5

Consumers Choose More Space And Fireplace As Extras

When asked which 2 extra features they would choose for their new home if they could only choose 2, consumers preferred an extra bedroom and fireplace. An extra bath ran a close third.

Extra features consumers prefer



Enlarge Family Areas And Storage, Buyers Say

When asked where they would add extra square footage if they could design their new home, consumers' top 3 choices were the family room, meal preparation area and storage in the master suite.

Areas consumers would enlarge	
Family room	45.5%
Living room	25.5
Dining room	13.6
Bonus room	12.2
Kitchen:	
Meal preparation area	48.0
Eating area	30.1
Master suite:	
Closet	34.7
Bathing	22.8
Sleeping	13.3
Sitting	9.6
Office/hobby room	21.6
Secondary bedrooms	14.8
Secondary bathrooms	7.5

Builders Emphasize Inner Space

Special design and marketing techniques are needed when the square footage and lot size has decreased; 74% of builders said they are improving interior space planning to maximize square footage.

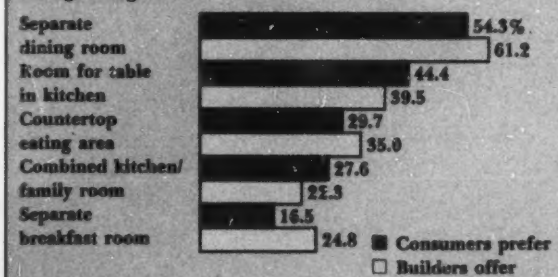
Special design/marketing techniques used for smaller houses or lots	
Improved interior space planning	74.3%
Additional or upgraded standard features	45.7
Improved exterior land planning	40.7
Improved interior decorating to show how space "lives"	35.0
More amenities	35.0
Additional or upgraded energy features	27.9
Other	5.7

Space Is The Buzz Word. Give Them Rooms For Solitude, Rooms For Entertaining

Buyers Want Space For Family Dining And Entertaining

More than 50% of consumers want a separate dining room in their new homes. Even 50% of buyers of attached housing want a separate dining room.

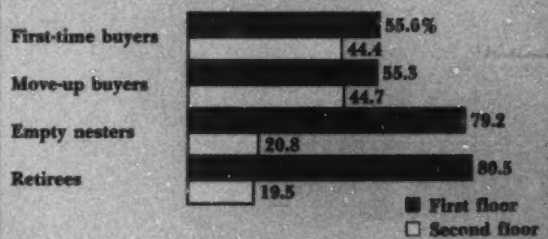
Eating arrangements



Locate The Master Suite On The First Floor

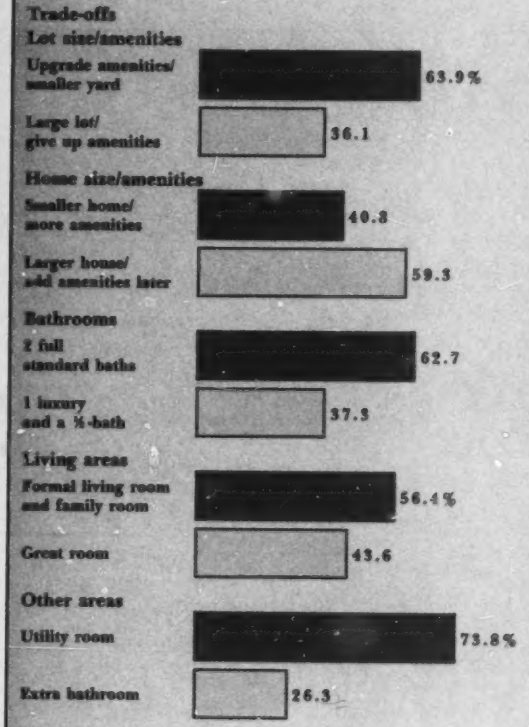
Most consumers want the master suite on the first floor of their new home—particularly older buyers. The greater the price, however, the more buyers prefer a second-floor master suite.

Location of master bedroom



Trade-Offs: Buyers Spell Out Their Preferences

When you can't have everything, what will you choose? Consumers made their choices between lot size, home size, amenities, bathrooms, living areas, and other areas.



When It Comes To Design, Make It Appealing And Live Large

The top 3 design elements that consumers consider most desirable revolve around the need for storage. Other survey results showed that only 49% of builders offer extra garage storage space as a standard feature; only 63.8% offer a patio; 51.3% offer a porch; 50.3% offer a covered entry; 12.8% offer built-in furniture.

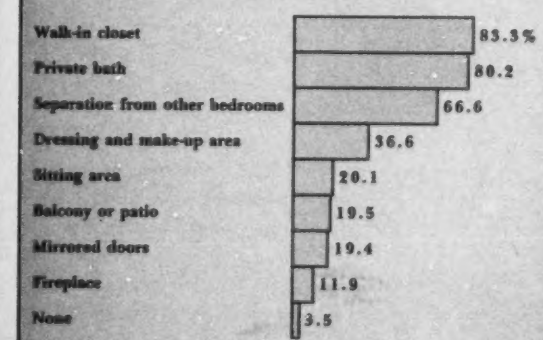
Design elements	Most desirable
Linen closet	87.2%
Garage storage space	80.1
Pantry	79.3
Patio	75.4
2 closets in master suite	75.6
Space for family entertainment	73.1
Porch	71.1
Covered entries	66.9
Multi-purpose rooms	62.5
Oversized master bath	52.6
Part-time home office/hobby room	42.6
Built-in furniture	42.4
Cathedral/vaulted-type ceilings	41.9
Formal entertaining space	38.0
Home entertainment center	37.4
Raised flat ceilings in living area	37.3
Sunroom or greenhouse type room	34.5
Space for full-time office	30.7
Garden bathroom	24.1
Dramatic window treatments	24.0
Interior plant shelves/wall niches	22.6
Interior lofts/balconies	21.0

Note: Consumers rate these elements on a scale of 1 to 5, from least desirable to most desirable. Shown here is a composite of ratings 4 and 5, those consumers who rated these elements as more desirable on the scale.

Storage And Privacy Make Master Suite Special

More than 80% of all consumers prefer a walk-in closet and a private bath as part of the master suite; 66% want the master suite separated from other bedrooms.

Most important master bedroom elements



Almost 60% Of Buyers Would Consider Attached

In last year's consumer survey, 51.9% of consumers said that they would not consider attached under any circumstances. This year, almost 60% would. Other survey results showed that 31.8% of builders said attached housing has increased when compared with their total residential construction activity. More than 40% of attached units have a density of less than 4 units per acre.

Features that would make attached housing acceptable	Detached buyers	Attached buyers
Wouldn't consider attached	41.9%	3.1%
Privacy at rear of unit	35.2	37.5
Energy-saving features	23.1	43.8
Sound control to exclude noise	22.3	40.6
Offered a sense of neighborhood	21.4	37.5
Recreational facilities	15.9	31.3
Situated in a planned community	14.7	28.1
Price included maintenance	14.5	37.5
Common open space	13.1	21.9
Proven security system	11.5	15.6

TELL THEM IT IS A GOOD INVESTMENT

The buying decision hinges on a delicately balanced relationship between buyer, builder and lender. Here, consumers talk about what motivates them to buy.

Changing Needs Produce Need To Change

Among all consumers, most are motivated to move as a result of a house that is too small; 60% of first-time and move-up buyers are dissatisfied with a current house that is too small. Empty nesters and retirees want a different house because their current home requires too much maintenance.

Dislike about present home	
Too small	43.7%
Job/family needs have changed	29.2
Location	28.1
Too much maintenance	19.4
Neighbors	14.9
Old fashioned kitchen	12.1
Old fashioned bathrooms	10.5
Too large	9.2
No excitement	6.4
Schools	6.0

Affordability, Size And Investment Value Determine Which House To Buy

Buyers say the affordability, size of house (number of rooms), and the investment value are the 3 most important factors when selecting a home. These 3 factors are consistent throughout all 4 buyer types surveyed.

Important factors when selecting a home	
Price/affordability	66.3%
Size (number of rooms)	44.7
Good investment/appreciating value	39.4
Style and appearance	31.3
Quality of schools	26.9
Size of yard/lot	24.0
Close to work	21.3
Builder reputation	20.0
Warranty on house and equipment	12.4
Located in prestigious neighborhood	8.9
Close to shopping	8.6
Known brand names used throughout	7.2
Close to public transportation	5.2

Desire For Security And Privacy Influence Buying Decision

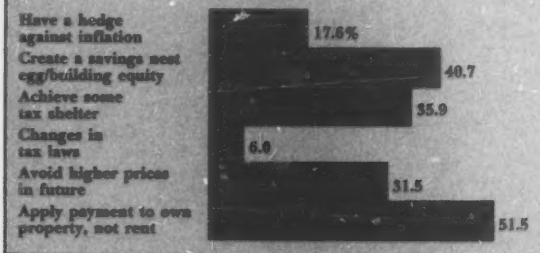
Security and privacy is the most popular lifestyle factor in the buying decision among all 4 buyer types. The sheer prestige of home ownership is not reason enough to buy a home, consumers indicate.

Lifestyle factors that influenced buying decision	First timers	Move ups	Empty nesters	Retirees
Provides security/privacy	61.2%	60.1%	63.9%	75.4%
Establishes roots in community	20.3	16.4	12.4	12.3
Sheer prestige of owning a home	17.5	8.5	5.2	5.7
Essential to raising a family	37.4	45.1	12.4	9.8
Conforms best to my lifestyle	29.7	52.5	57.7	60.7
Avoids dealing with a landlord	23.4	7.7	27.8	16.4

Buying A Home Makes Best Financial Sense

More than 50% of consumers would rather apply a payment to something they own than "throw away" money on rent. And among first-time buyers, 72.3% are motivated to buy a home for this very reason.

Financial factors that influenced buying decision

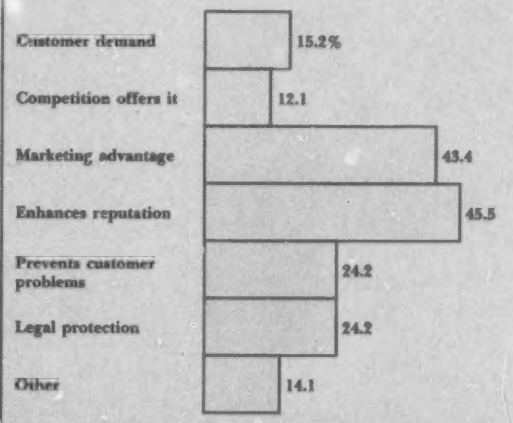


Insured Warranty Is Significant To Most Buyers

An insured warranty is very important to all buyer types, but only 39.2% of builders surveyed said they offered an insured warranty. Survey results also show that 56.9% of attached-housing buyers would not consider buying a home without an insured warranty. Overall, only slightly more than 50% of all consumers would consider buying without such a warranty.

Importance of insured warranty in buying decision	First-time buyers	Move-up buyers	Empty nesters	Retirees
Very important	56.1%	46.2%	51.6%	59.1%
Somewhat important	36.5	41.0	42.3	32.2
Not important	7.4	12.8	6.2	8.7

Why builders offer an insured warranty



Less Maintenance Attracts Buyers To Attached Homes

Less home maintenance is the main reason a consumer would choose an attached home or condominium; 70% of all empty nesters and retirees say less home maintenance would be an attractive feature.

Reason for choosing attached home or condo	Attached buyers
Less home maintenance	73.6%
Recreational facilities	37.2
Only housing available at location	15.7
Best way to buy first home	25.6
Offers sense of neighborhood	27.3
More house for the money	21.5
Only type of housing I can afford	21.5
Increased prestige	5.0
I prefer the cluster lifestyle	8.3

Other Survey Highlights On Buyer Motivation:

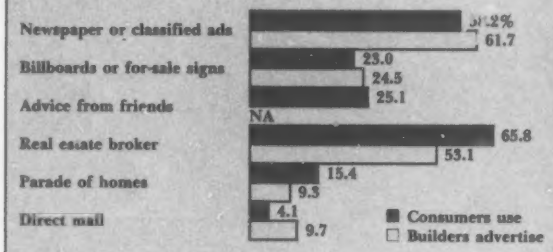
- **More than 28% of consumers were purchasing a home for the first time and almost 20% were moving up a second or third time to gain more space.**
- **Buyers have previously owned an average of 1.6 houses; 50% have bought 1 new home and 55.7% have purchased an existing home.**
- **Consumers have owned their present home for an average of 7.6 years, paid an average of $73,130 for it and expect to sell it for an average of $131,300.**
- **Size and location make a new home a must. 33% of responding consumers need more space; 20% want a better location.**

Consumers Scored Model Homes Fairly High; Sales Staffs Didn't Do So Well

Consumers Depend On Brokers, Ads For Information

While searching for a new home, consumers rely primarily on real estate brokers and newspaper or classified ads as their sources of information. A significant 25.1% of all buyers and 34.4% of attached buyers seek the advice of friends in their search for a new home.

Most important sources in search for new home



Buyers Want The Basics In Real Estate Ads

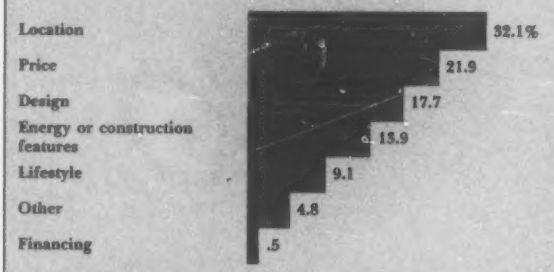
Forget the fancy drawings, elaborate copy and color. Buyers want the facts when it comes to real estate advertisements. Tell them how much, what to expect, and how to get there.

Important elements of a real estate advertisement	
Price of house	96.7%
Floor plan	87.7
Photo of house	84.1
Description of model	75.7
Map with directions to house	54.3
Drawing of house	25.9
Color advertisement	24.7
A lot of copy	14.0
Minimum copy	7.5
Black-and-white advertisement	6.8

Builders Focus On Location And Price In Ads

Location is the key element of real estate success. And 32% of builders report that location is the primary focus of their new home advertising efforts. In attached housing, 41.1% of builders emphasize location in ads.

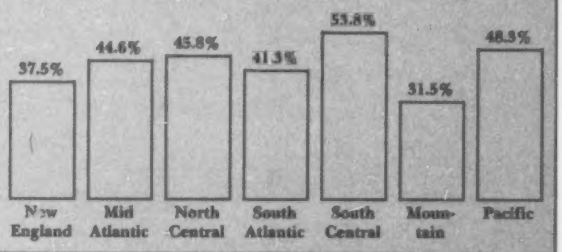
Primary focus of home advertising efforts



Furnished Models Affect The Buying Decision

A significant percentage of buyers across the nation say interior furnishings and decorating provided by the builder play an important part in the buying decision. Almost 80% of builders say they furnish their model homes for a cost averaging $22,840 per model.

Yes, furnished and decorated models are important to buying decision.



Location And Quality Spell Success For Most Builders

More than 60% of builders attribute the success of their residential projects to an emphasis on location and quality. The success of attached housing was attributed to location by 75% of responding builders. In the Mid-Atlantic and Pacific regions, more than 75% pointed to location for success.

Success of residential projects	All builders
Location	61.3%
Overall quality	60.2
Design	55.2
Price	41.8
Features	23.4
Size of home	14.6
Energy	13.8
Marketing techniques	8.8
Financing	6.1
Products	2.7

How Well Does Your Sales Force Rate?

According to consumers, salespeople they encounter in model homes get poor grades. Most salespeople make consumers feel welcome, but fall short in presenting the advantages, hidden values and differences.

How many salespeople fit this description?	Consumer rating		
	Most	Some	Few
Present basic advantages of home and community	41.5%	43.5%	15.0%
Point out hidden values	36.9	41.8	21.3
Treat me like a person	33.0	45.8	21.2
Too pushy	25.0	36.4	38.6
Point out differences without demeaning competition	20.2	45.8	34.0
Not interested in the customer	15.3	44.9	39.7
Not knowledgeable about house	12.2	43.7	44.1
Don't make me feel welcome	7.6	35.0	57.4

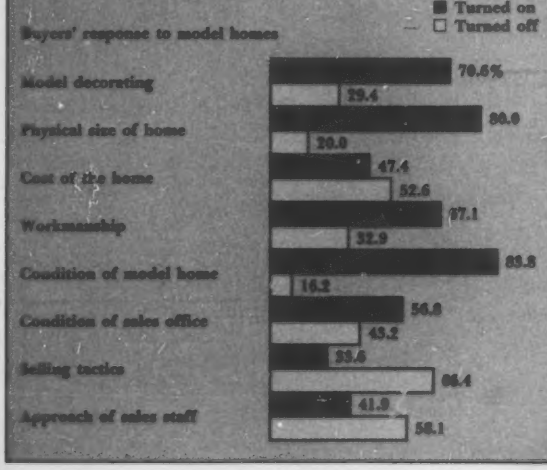
Do Your Models Have The Information Buyers Want?

Information at model-home sales centers is important to the consumer's buying decision. Complete information could mean the difference between a visit and a sale. Surprisingly, less than 75% have floor plans and only 52.8% supply price lists.

Information at model-home sales center	Builders include
Floor plans of houses available	72.8%
Material samples/color selections	59.8
Land plans	55.9
Price lists	52.8
Lists, samples, prices of options	50.8
Financing assistance/data on rates	46.5
Information on homeowner costs	44.9
Standard warranties	44.9
Maps showing community facilities	32.3
Description of project amenities	28.0
Scale models/drawings of exteriors	27.2
Information on home operating costs	25.2
Information on home maintenance	18.9
Displays on energy-saving features	14.6
Future expansion/finishing ideas	10.6
None/do not have model sales center	24.0

Buyers Turned On By Models, Turned Off By Sales Staff

A weak link in a builder's marketing plan can mean lost sales. The chart below helps reveal where those weak (or missing) links may be located. Consumers responded to what turned them on or off in model home merchandising.



Other Survey Highlights On Marketing:

- Maximize model-home merchandising by showing how extra bedrooms can be used. More than 50% of consumers would use an extra bedroom for a den, library or office; 63.5% would use it as a guest bedroom; 30% would use it for a hobby or sewing room.
- Overall, 34.7% of consumers say the kitchen is most likely to affect their impression of the house, while 34.5% say an open floor plan would make a significant impression; 7.9% voted for the living room and 6.9% for the master bedroom. Rating less than 5% were the family room (4.7%), the entry (3.8%), volume ceilings (1.9%), and the master bath (1.5%). In New England, the kitchen rated 48.3% in importance. An open floor plan impressed 44.4% of consumers in the West North Central region.
- Among all consumers who are house shopping, 55.4% have visited a detached model house within the past 6 months. Only 23% of buyers of attached housing have visited an attached model.
- Almost 25% of model homes are introduced in April, more than any other month. The next highest month was March with 18.5% of models opening.
- Nationally, 25% of builders' most popular model homes with land sell for $100,000 to $149,000. This was the most active price range among builders of both detached and attached housing.
- Builders construct an average of 2.1 model homes at each of their sales locations. Builders in the Pacific region used the most (average 3.5 models per location); builders in New England and East North Central used the fewest with an average of only 1 model per sales location.
- Forty-four percent of builders report they plan their model homes 6 months to 1 year in advance of introduction. And 34.3% of model homes are used from 6 months to 1 year.
- About 65% of builders of detached homes do not use model homes while 77.3% of builders of attached housing do use model homes.
- Almost 75% of builders' best-selling model homes are fully landscaped on the outside. Only 3.4% of builders do not provide some type of exterior finishing work. Nationally, 12.5% of models are provided with a lawn only.
- Sales centers are located inside a model by more than 50% of builders who responded. About 25% of the sales centers are located in the garage of a model. Sales centers are constructed and decorated for an average of $31,078.
- A price discount on a new home is the promotional activity that will attract 67% of buyers to the model home site. A grand-opening celebration would draw out 22.4% to the sales site and only 12% would come if offered a free gift for attending.
- Only 21% of builders view first-time buyers as a solid, long-term market for new home builders; 50% of builders view first-timers mainly as a market for existing home sales. Move-up buyers are considered by 46.6% of builders as a market for new home sales; 37% consider move-ups as a market for both new homes and existing homes. Retirees are considered by 44.9% of builders as prospects for new homes; 40.7% of builders are retirees as a market for both new and existing homes.

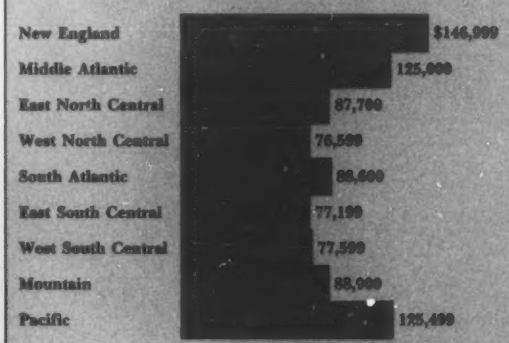
MAKE IT BEAUTIFUL, BUT MAKE IT AFFORDABLE

If they don't have the cash, you won't make the sale. Consumers give their views on housing costs. Builders show how to reduce those costs to keep the American dream alive.

Highest Prices Appear On Both Coasts

While most consumers would consider a median price of $93,849 for a new home, prices range widely from region to region. Contrast the prices consumers seek with the $132,000 median price of builders' best-selling models.

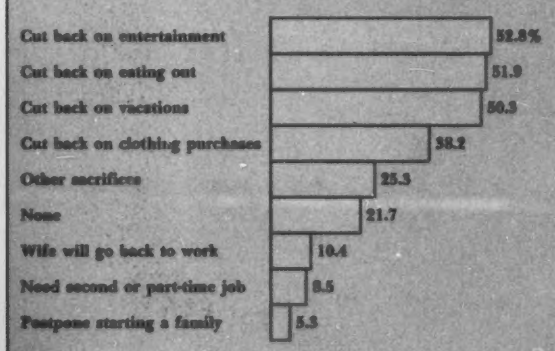
Median price buyers will pay for a new home



Consumers Cut Back On Extras To Afford A New Home

Entertainment, eating out and vacations were cut by about 50% of all buyers in order to save for a new home. Almost 67% of first-time buyers sacrificed these extras.

Initial sacrifices made to afford a new home



Decreased Rates And Payments Say 'Buy Now'

Decreased mortgage interest rates and affordable monthly payments were the 2 reasons most likely to encourage consumers to buy a home now. Among market segments, 70% of move-up buyers were prodded by mortgage rates and 73% of first-time buyers were motivated by affordable monthly payments.

Reasons for buying a home now	Consumers
Decrease in mortgage interest rates	59.2%
Finding affordable monthly payments	58.4
Receive an inheritance	32.3
Less expensive housing became available	30.5
Iron-clad guarantee on quality	21.9
Tax reform	21.2
Drastic change in lifestyle	18.9

American Dream Makes Homeownership A High Priority

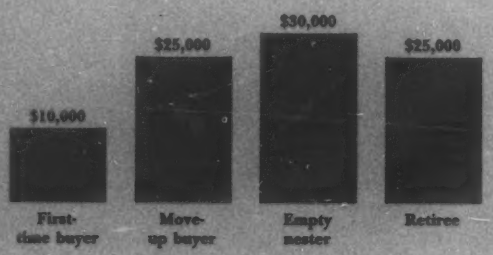
The primary reason for buying a home is to quit paying rent, say more than 80% of buyers. The greater the price, the more buyers want to own for investment, equity and tax reasons.

Reasons to buy rather than rent	Consumers
Want to own home, not pay rent	83.9%
Own property as investment/build equity	76.1
Own for tax reasons	61.6
Concerned about house prices going up	38.5
Settle down and have roots	36.9
Don't want to be dependent on landlord	36.1
Found attractive residence for sale	26.2
Found affordable mortgage plan	18.4
Worried about rents going up	11.9

Buyer Type Influences Down Payment

Overall, buyers could pay an average downpayment of $34,199 (median $20,000). But the amount differs greatly by market segment, as shown. More than 40% of first-time buyers could pay less than $10,000.

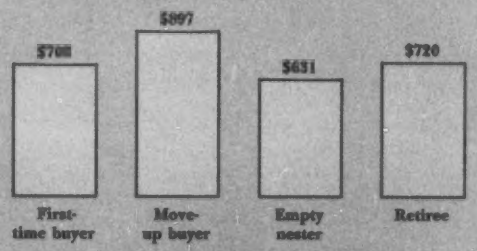
Median down payment



Affordability Per Month Is The Name Of The Game

The average monthly payment buyers can afford ranges from $631 for empty nesters to $897 for move-up buyers. Among all consumers, the average is $785 (median $677). One-paycheck families can afford an average $766; 2-paycheck families average $844.

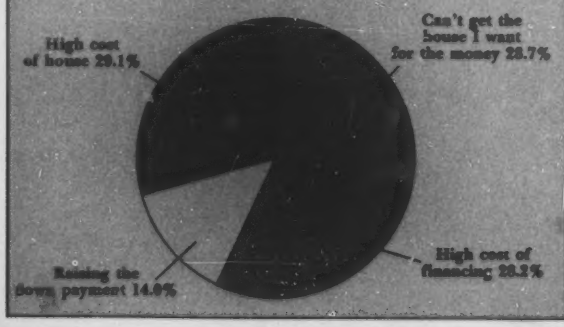
Maximum affordable monthly payment



High Costs And Expectations Are The Greatest Obstacles

High new-home price tags and the high cost of financing are the greatest reasons for not purchasing a home now.

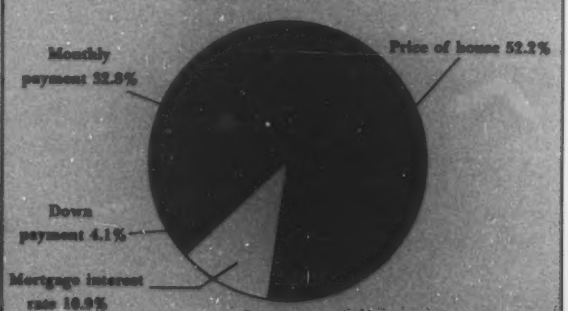
Greatest single obstacle to purchasing a home



Buying Decision Is Balanced On Price And Monthly Payments

More than 50% of buyers say the price of the house significantly affects the buying decision. That percentage goes to 60.3% for buyers age 50 to 59.

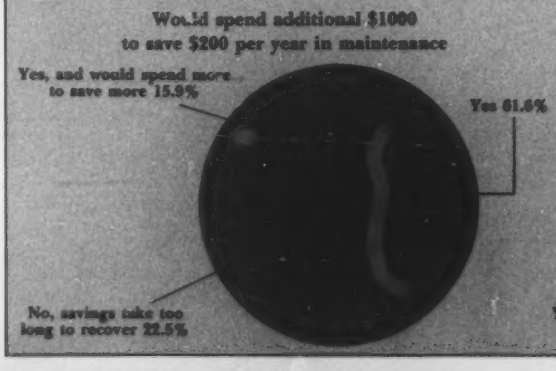
Most important in buying decision



They're Frugal, But They Will Pay More Now To Save Down The Road

Thrifty Consumers Will Pay More To Save More

More than 75% of consumers would spend at least $1000 more on low-maintenance materials in order to save an average of $200 annually on maintenance costs. And 91.1% of consumers would spend at least an extra $500 on energy-saving products or features to save $100 per year on heating and cooling.


Would spend additional $1000
to save $200 per year in maintenance
Yes, and would spend more
to save more 15.9%
Yes 61.6%
No, savings take too
long to recover 22.5%

Would spend an extra $500
to save $100 per year on energy costs
No, savings take too
long to recover 8.9%
Yes 66.6%
Yes, and would spend more
to save more 24.5%

Government Should Help First-Time Buyers

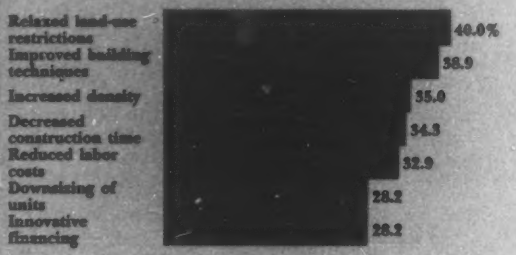
More than 68% of consumers are in favor of some type of government help to assist first-time buyers. The most popular plans among first-time buyers were those that keep payments low or have a low down payment.

Government help for first-time buyers	
Offer financing plans to keep payments lower	19.5%
Offer financing plans with low down payment	18.4
Provide tax savings for down payment	13.0
Subsidize mortgage interest rates	11.1
Help builders provide more affordable homes	7.1
Provide no government help	31.1

Reducing Costs May Mean Changes In Codes, Builder Initiatives

Builders reported the areas that offer the greatest potential for reducing the price of new housing may require changes in building codes. Others may require creative planning on the part of builders.

Greatest potential for reducing price of housing



Don't Cut Corners, Just Trim Excess Costs

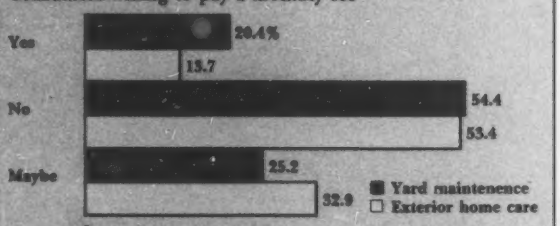
Builders say that the most popular way to trim costs in new homes is to use standard designs; 60% of builders in the North Central region rely on this cost-cutter.

Ways that builders can help reduce cost of new homes	All builders
Use standard designs to save money	45.0%
Use smaller lots to build homes	36.5
Build attached townhomes and condos	33.2
Design homes for future expansion	30.5
Build smaller homes	27.0
Erect prefab homes	12.8

Most Buyers Still Want To Do Their Own Maintenance

For those who choose to buy a single-family house, more than 50% would not be willing to pay a monthly fee for yard maintenance or exterior home care. Even among retirees, only 36% were willing to pay for yard work and 22.5% for exterior care.

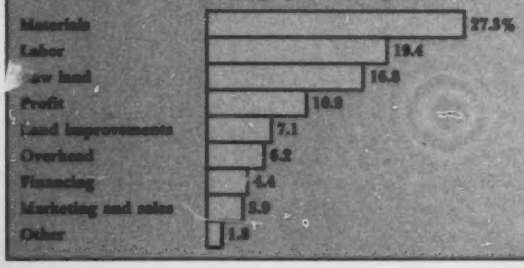
Consumers willing to pay a monthly fee



Materials, Labor, And Land Account For Nearly 64% Of New Home Price

Three major elements add up to an average of 63.5% of the cost of a new home, say builders. On average, the more expensive the home, the higher the percentage cost of raw land.

Cost breakdown of new home — Average percent of price



Other Survey Highlights On Financing:

- Households are evenly divided between 1- and 2-paycheck families. Slightly more than 50% of attached buyers have only 1 income, as do buyers of homes less than $85,000 and more than $150,000. Among first-time buyers, there are slightly more (51.5%) families with 2 breadwinners, move-up buyers 53.2%; 60% of empty-nesters rely on 1 paycheck as do 61.1% of retirees.

- Consumers (44.2%) say affordable for-sale housing, is available, but very hard to find; 37.4% of consumers said a wide selection of affordable housing was available. Percentages barely differed by buyer type.

WHAT DO YOU HAVE THAT THEY DON'T?

Meet the competition head on. Select products with impact. And don't forget consumers expect quality. Give them what they want—not just what they need.

Buyers Have Great Expectations In Baths And Kitchens

Make the wet rooms practical, but also make them luxurious, say consumers. This chart compares the wants of buyers to what builders offer as standard features in their best-selling models.

Bathroom features	Consumers want	Standard offer in model
Medicine cabinet	86.1%	60.1%
Exhaust fan	85.7	90.6
Linen storage cabinets	79.7	59.4
Tub/shower door	65.8	59.4
Ceramic tile floors	53.1	46.5
Ceramic tile walls	49.3	28.9
1-bowl vanity	47.5	46.5
Safety features	43.8	23.3
2-bowl vanity	40.4	50.0
Bathroom heater	38.7	24.2
Colored fixtures	36.2	51.3
White fixtures	27.6	38.7
Dressing area	26.4	28.3
Mirrored wall	22.5	71.4
Ceramic tile vanities	21.9	13.8
Skylight	17.9	29.9
Compartmentalized bath	17.7	13.2
Whirlpool	14.0	29.6
Bidet	4.2	4.1
Sauna	3.0	1.9
Kitchen features		
Range/oven	89.0%	90.9%
Dishwasher	80.6	95.6
Vinyl floor covering	69.3	78.6
Self-cleaning oven	66.8	65.1
Pantry	66.4	56.0
Garbage disposal	65.2	74.8
Stainless-steel sink	60.3	65.4
Refrigerator	59.8	45.3
Single-handle faucet	56.5	78.0
2 sinks	54.9	41.5
Fluorescent ceiling lighting	52.5	50.6
Laminated plastic countertop	44.6	75.2
Microwave oven	41.2	47.8
Ceramic tile countertop	31.2	16.0
2-handle faucet	31.1	19.2
Enamel/porcelain sink	29.7	32.1
Ceramic tile floors	21.6	16.7
Trash compactor	19.7	15.7
Ceramic tile walls	12.6	6.0
Carpeted floor	9.2	6.3

Practical Functions Make 'Intelligent' House Attractive

An "intelligent" house is one in which a centralized electronic system monitors and controls different functions in the home. The most popular intelligent features are security/safety and energy management.

Intelligent house features	Consumers want	Average cost willing to pay
Security/safety	71.0%	$1004
Energy management	66.6	968
Entertainment	43.8	835
Communications	39.1	516
Service/data	15.8	444

Other Survey Highlights On Products:

- More than 40% of builders use R-19 or more insulation in the walls of their best-selling home; nearly 40% use R-11 to R-13 insulation. More than 50% of builders reported using R-30 or more insulation in the ceilings of their best-selling home.
- Builders reported their standard allowances included: $1045 for lighting fixtures, $1859 for plumbing fixtures, $1787 for appliances, and $2510 for landscaping.
- The 2 most popular roofing materials were fiberglass shingles (42.8%) and asphalt shingles (36.9%), reported builders.
- A forced-air heating system is included in 63.8% of best-selling models. All builders responding in the East North Central and West North Central regions use a forced-air system. Nationally, 23.2% of model homes use heat pumps. More than 50% of builders in the South Atlantic region include heat pumps in best-selling models.
- Among standard features in builders' best-selling models, 33% include wallpaper, although 75% of models in the East South Central region and 81.8% of model homes in the West South Central region include wallpaper as a standard feature. Nationally, the Pacific region reports the highest usage of triple glazing with 33% of models including it as a standard feature (national average was only 19.9%). More than 90% of models in the West South Central region and Pacific region include decorative wood molding and ceiling beams as standard features (nationally only 50%).

It's The Extras That Clinch The Sale

Consumers were asked to choose features they would pay extra for. Builders listed which of the same items they include as standard in their best-selling homes. Features are listed by price range. Products make a home functional, but they can also maximize its marketability.

	Buyers choosing option	Builders offer as standard
$100 to $300 options		
Smoke/fire alarm system	67.1%	90.3%
Energy-saving water heater	64.9	80.7
Ceiling fan	58.0	52.2
Self-cleaning oven	55.5	76.9
TV antenna/wall jacks	53.5	83.7
Outdoor lighting	50.2	63.1
Shower enclosure	44.2	68.6
Dimmer switches	38.2	43.1
Water-saving showerheads	36.3	68.0
Water-saving faucets	31.9	62.9
Clock-controlled thermostat	31.4	28.4
Closet organizers	29.7	38.4
Decorative exterior door	27.0	78.6
Patio grill	21.7	2.7
Exterior shutters	21.6	66.8
Trash compactor	21.2	17.4
Gas outlet at fireplace	20.4	37.1
Sump pump	18.9	40.5
Separate cooktop	17.6	23.3
Mirrored doors	16.6	71.4
Interior shutters	8.5	.7
$300 to $500 options		
Garage door opener	53.9%	56.2%
Lawn-sprinkling system	41.6	24.9
Storm door	41.3	36.6
Ceramic tile bathroom walls	40.9	46.5
Microwave oven	39.0	50.4
Power attic ventilator	35.4	26.7
Built-in cabinets (excluding kitchen)	34.5	26.8
Ceramic tile entry	31.1	51.8
Automatic humidifier	26.1	15.0
Patio privacy fence	24.2	21.6
Greenhouse/planter window	21.3	17.2
Wood sliding/patio door	19.0	92.4
Electronic air filter	18.0	11.2
$500 to $800 options		
Paved driveway	66.3%	82.1%
Refrigerator	53.2	45.5
Decking for patio	41.3	60.2
Skylights	36.7	57.3
Extra-large tub	29.7%	40.6%
Concrete patio	24.7	63.4
$800 to $1000 options		
Upgraded carpeting	61.9%	28.8%
Double-glazed windows	46.9	89.9
Closet/utility room shelving	39.5	65.2
Patio roof	28.8	20.7
Water softener	26.4	6.4
Intercom system	18.2	17.5
$1000 to $1200 options		
Zoned heating/cooling system	64.3%	69.2%
Laundry appliances	56.9	22.3
Central vacuum system	29.8	12.8
Wet bar	19.7	24.9
European-style cabinets	11.7	33.3
$1200 to $1500 options		
Yard fencing	50.2%	27.1%
Tub and separate shower	45.4	62.7
Hardwood floors	44.6	31.8
Solar water heating	25.0	1.4
Kitchen barbecue/grill top	16.5	22.6
$1600 to $2000 options		
Air conditioning	76.6%	76.3%
Storm windows	56.7	41.2
Burglar/security system	34.1	21.4
Bay window	29.9	47.3
Front yard landscaping	29.8	79.3
Insulated basement walls	29.6	47.0
French doors	23.2	46.6
Whirlpool bath	21.3	32.9
Sauna	7.5	2.8
Bidet	4.1	3.3
$3000 to $6000 options		
Fireplace	76.8%	68.4%
Hot tub	32.6	3.3
Additional powder room	16.7	38.5
$6000 to $12,000 options		
Screened porch/Florida room	59.0%	20.0%
Complete landscaping	56.4	73.4
$12,000 to $20,000 options		
Swimming pool	56.7%	14.0%
Rec room in basement	52.4	14.6